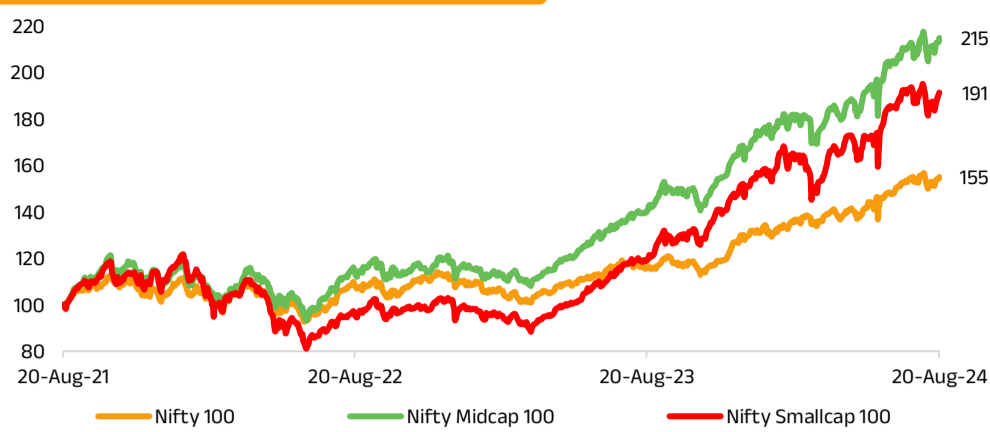


Broad Indices Historical Movement



Source: NSE

Broad Indices

	20-Aug-24	1 Day	1 Week	1 Month
Nifty 50	24,698.85	0.51%	2.32%	0.68%
Nifty 100	25,782.35	0.56%	2.49%	1.30%
Nifty 200	14,030.80	0.61%	2.48%	1.76%
Nifty 500	23,280.35	0.61%	2.53%	1.87%
Nifty Large Midcap 250	16,264.15	0.70%	2.40%	2.36%
Nifty Midcap 150	21,529.05	0.83%	2.30%	3.44%
Nifty Next 50	73,971.30	0.82%	3.30%	3.67%
Nifty Smallcap 250	17,732.50	0.54%	3.23%	3.32%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Smart Beta Index

Index	20-Aug-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	36,219.15	0.64%	2.69%	4.31%
NIFTY 500 Value 50	15,146.47	1.01%	3.14%	2.29%
Nifty 200 Quality 30	22,340.70	0.47%	2.76%	3.18%
Nifty 50 Equal Weight	31,646.15	0.76%	2.47%	2.25%
NIFTY Alpha Low Volatility 30	29,611.40	0.49%	1.36%	3.14%
Nifty High Beta 50	4,144.16	0.94%	2.75%	-0.28%
Nifty Low Volatility 50	25,005.55	0.68%	1.92%	2.09%
Nifty Midcap150 Momentum 50	64,915.30	1.03%	2.54%	3.22%
Nifty PSE	11,366.20	0.46%	2.47%	4.00%
Nifty SME Emerge	15,382.22	0.57%	2.65%	6.76%
Nifty 100 ESG	4,955.45	0.79%	2.89%	1.77%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Sector Indices

Index	20-Aug-24	1 Day	1 Week	1 Month
Nifty Auto	25,500.00	0.52%	1.67%	2.15%
Nifty Bank	50,803.15	0.86%	1.95%	-2.80%
Nifty Consumption	11,812.15	0.15%	1.67%	3.67%
Nifty Financial	23,178.15	1.11%	2.57%	-1.77%
Nifty FMCG	62,240.60	-0.14%	1.21%	1.89%
Nifty Healthcare	14,019.65	0.53%	0.85%	8.11%
Nifty IT	41,572.80	0.81%	6.28%	4.13%
Nifty Media	2,075.20	-0.27%	1.78%	5.72%
Nifty Metal	9,204.65	0.47%	2.76%	-0.56%
Nifty MNC	30,704.45	0.35%	1.70%	0.82%
Nifty Pharma	22,374.25	0.61%	0.82%	9.54%
Nifty Realty	1,052.35	0.20%	2.36%	-4.00%
Nifty Energy	43,527.65	0.45%	2.25%	3.48%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Nifty 50 Top 5 Gainers

Company	20-Aug-24	Prev_Day	% Change	1 Week
SBI Life Insurance Company Limited	1,761.30	1,671.55	5.37	4.69
HDFC Standard Life Insurance Company Limited	710.60	685.70	3.63	3.74
IndusInd Bank	1,381.30	1,347.60	2.50	2.27
Hindalco	672.90	658.85	2.13	8.29
Tech Mahindra	1,628.60	1,594.65	2.13	8.33

Source: NSE

Nifty 50 Top 5 Losers

Company	20-Aug-24	Prev_Day	% Change	1 Week
ONGC	330.10	335	-1.55	-1.73
Bharti Airtel	1,449.15	1470	-1.39	-0.72
Cipla	1,562.85	1576	-0.80	-1.30
ITC	498.80	501	-0.53	1.80
Tata Beverages	1,171.20	1177	-0.53	-0.64

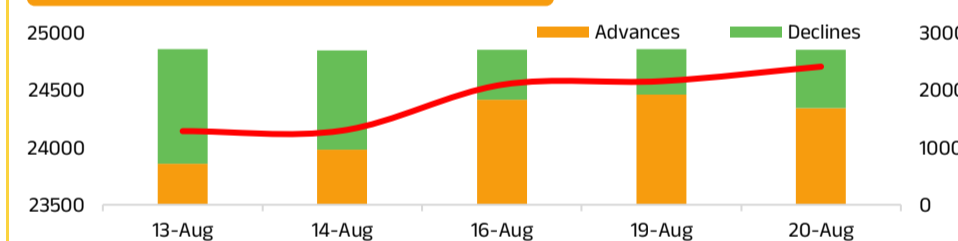
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

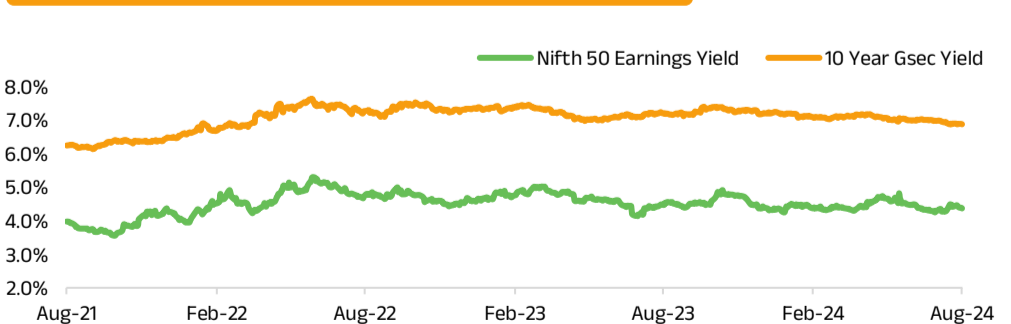
Indian equity markets experienced gains fueled by anticipation that the U.S. Fed Chairperson might deliver distinct indications regarding the probable magnitude of a rate reduction in Sep 2024, during the forthcoming Jackson Hole Symposium this week. Gains were extended following a fall in global crude oil prices due to ease in geopolitical tensions.

Infosys is set to generate over \$100 million as a key partner in a \$1.1 billion cloud migration agreement involving Coca-Cola and Microsoft. The deal, signed in Apr 2024, highlights the growing role of Indian IT service providers in major global technology transformations.

DCM Shriram Ltd has declared the commissioning of a new hydrogen peroxide facility at its chemical complex located in Jhagadia, Bharuch district, Gujarat. The plant, which has a production capacity of 52,500 tons per annum, is integrated within the company's Chemicals complex, utilizing hydrogen generated on-site.

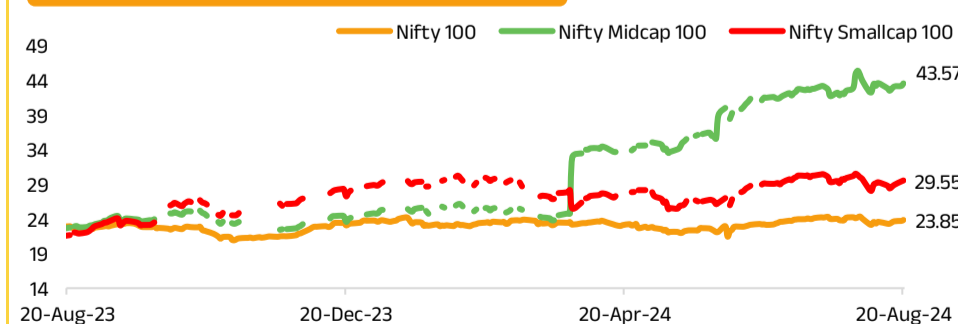
The ministry of road transport and highways wants to build a unified public transport and terminal system. This plan focuses on bringing together roadways, railways, airways, waterways, and ropeways to make travel easier and more efficient for passengers. These terminals will serve as a single point for connecting various transport options.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



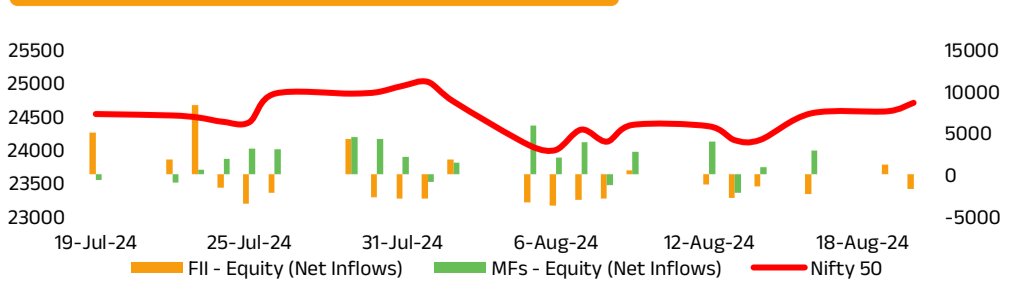
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

Description	INR Cr.			
	Net	MTD	QTD	YTD
FII	-1756.42	-21,761	10,604	13,804
MF**	2888.38	19,198	39,800	231,226
DII	2252.1	38,115	61,601	297,728

Source: SEBI, NSDL,**As on 16th Aug 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	24711.30	24595.80	0.47%
Near Basis	12.40	23.10	-46.32%
Mid Futures	24841.20	24723.50	0.48%
Mid Basis	142.30	150.85	-5.67%
Near Open Interest (Cr.)	1.08	1.10	-1.77%
Mid Open Interest (Cr.)	0.17	0.16	8.19%
Rollover (%)	16.28	15.06	8.11%
Put Call Ratio (OI)	1.27	1.17	7.76%
Put Call Ratio(Vol)	0.97	1.07	-9.56%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	1982	2286	36461
Index Options	2233793	2227329	372586
Stock Futures	21199	21412	322211
Stock Options	43641	44556	68041
Total	2300614	2295583	799299

Source: NSE

Global Equity Market

Global Indices	20-Aug-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3050.30	-0.25%	2.96%	1.59%
Nasdaq 100 (U.S.)	19719.82	-0.24%	3.75%	1.01%
FTSE (U.K.)	8273.32	-1.00%	0.46%	1.44%
DAX Index (Germany)	18357.52	-0.35%	3.06%	1.02%
CAC 40 Index (France)	7485.73	-0.22%	2.88%	-0.65%
SSE Composite (China)	2866.66	-0.93%	-0.04%	-3.88%
Nikkei (Japan)	38062.92	1.80%	5.05%	-4.99%
Kospi (South Korea)	2696.63	0.83%	2.87%	-3.54%
HangSeng (Hong Kong)	17511.08	-0.33%	1.96%	0.54%
Strait Times (Singapore)	3370.31	0.44%	3.43%	-2.24%
Ibovespa Sao Paulo (Brazil)	136087.41	0.23%	2.79%	6.64%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	7997.70	0.22%	2.18%	0.33%
Jakarta Composite (Indonesia)	7533.98	0.90%	2.41%	3.28%
KLSE (Malaysia)	1642.77	-0.36%	2.07%	0.38%

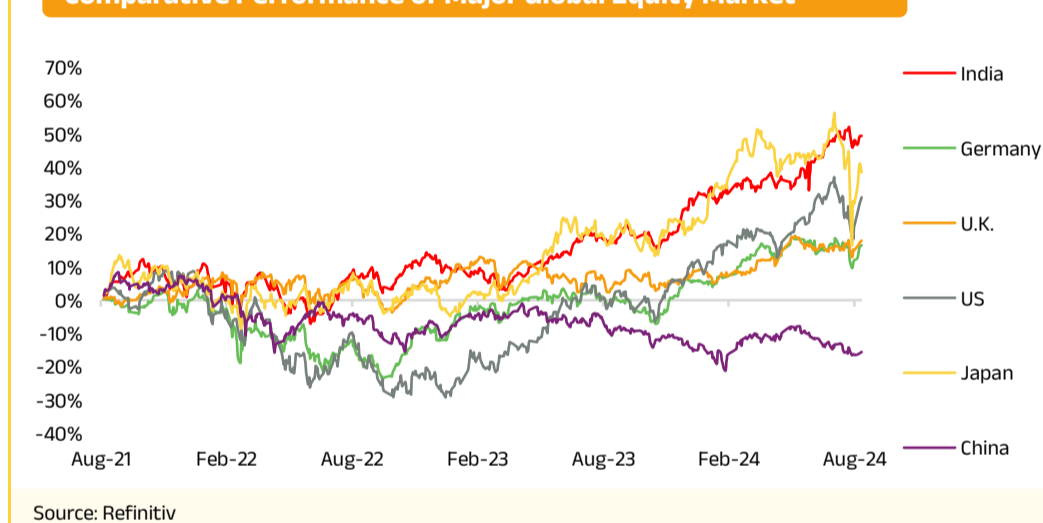
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

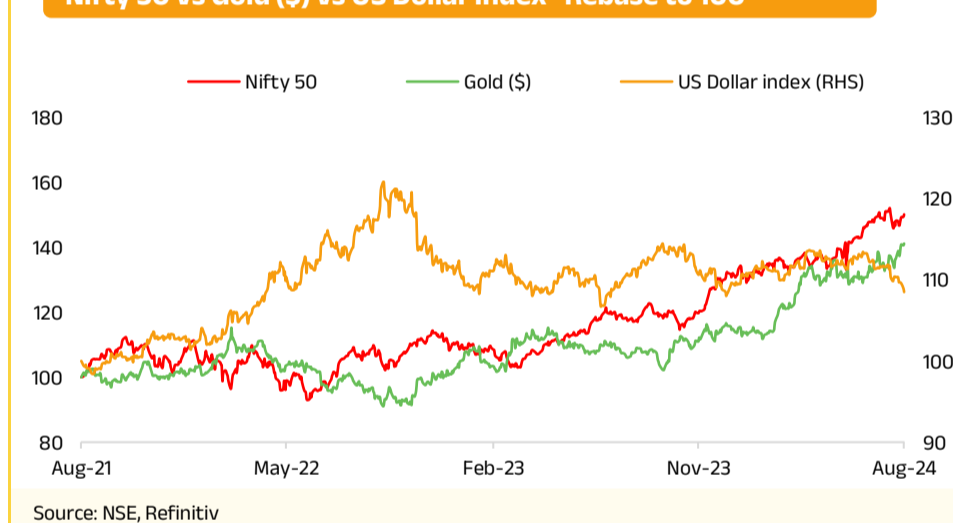
Commodity Prices	20-Aug-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	71,676	2.01%	2.16%	-2.04%
Gold (\$/oz)	2,513.74	0.39%	1.98%	4.70%
Silver (INR/1 kg)	85,109	4.45%	5.71%	-4.25%
Silver (\$/oz)	29.43	-0.17%	5.70%	0.57%
Brent Crude(\$/bbl)	80.05	-2.72%	-4.37%	-7.64%
Crude Oil (INR/1 bbl)	6,241.00	-3.01%	-7.17%	-9.90%
NYMEX Crude(\$/bbl)	75.12	-0.73%	-5.70%	-7.64%
Natural Gas (INR/1 mmbtu)	187.60	5.27%	2.07%	5.57%
Aluminium (INR/1 kg)	225.65	3.51%	4.93%	0.67%
Copper (INR/1 kg)	803.20	1.36%	2.32%	-2.42%
Nickel (INR/1 kg)	1,419.20	3.86%	4.06%	2.90%
Lead (INR/1 kg)	193.35	-0.26%	2.00%	-0.85%
Zinc (INR/1 kg)	269.85	1.89%	3.79%	0.28%
Mentha Oil (INR/1 kg)	998.00	-0.03%	0.34%	2.89%
Baltic Dry Index ^[1]	1,708	1.01%	2.28%	-10.20%

Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Comparative Performance of Major Global Equity Market



Nifty 50 vs Gold (\$) vs US Dollar Index- Rebase to 100



Term of the Day



Moving Average

Definition: Moving average is a type of a technical indicator used in charts that smoothens random or short-term fluctuations in price movement. In other words, it is used to analyze data points by calculating a series of averages of different subsets of the full data set. It is widely used in technical analysis and there are broad two types of moving average (MA) - Simple and Exponential.



Explanation

MA uses the basic philosophy of averaging and plots a parallel line with the daily price movement to gauge the direction of the current trend. MA is not used to predict the price direction but rather define the current direction with a lag. To calculate MA, a technical analyst use specific period depending upon the time frame such as 14-day, 50-day, 100-day and 200-day. However, analyst can use any period depending upon situation or his or her preference. Among EMA 12 and 26-day are the most popular short-term averages. The extension of MA is crossover MA, which plots two lines of different periods to understand buy and sell signals.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.45	14.85	36.16	16.83
Mid Cap Fund	3.72	22.50	51.53	25.36
Large & Mid Cap Fund	3.05	18.92	44.66	21.56
Small Cap Fund	4.35	20.08	47.76	26.54
Multi Cap Fund	3.43	18.53	45.57	23.17
Focused Fund	2.70	17.14	39.27	18.62
Value Fund	2.41	16.74	47.45	23.48
Contra Fund	2.57	18.42	49.65	25.88
ELSS	2.69	16.84	40.74	20.91
Equity Savings	1.18	7.28	16.13	9.62
Arbitrage Fund	0.49	3.62	7.40	5.59
Dividend Yield Fund	3.07	17.64	49.89	24.29
Aggressive Hybrid Fund	2.03	14.19	31.80	16.02
Balanced Advantage	1.56	10.10	25.11	12.77

Source: MFI 360 Explorer; Less than 1 year returns are absolute and greater than 1 year returns are CAGR. Category wise parent schemes are selected, which are available for investment to calculate average returns.

^[1]Data as on 19 Aug, 2024

Disclaimer:

All information contained in this document has been obtained by ICRA Analytics Limited from sources believed by it to be accurate and reliable. Although reasonable care has been taken to ensure that the information herein is true, such information is provided 'as is' without any warranty of any kind, and ICRA Analytics Limited in particular, make no representation or warranty, express or implied, as to the accuracy, timeliness or completeness of any such information. All information contained herein must be construed solely as statements of opinion, and ICRA Analytics Limited shall not be liable for any losses incurred by users from any use of this document or its contents in any manner. Opinions expressed in this document are not the opinions of ICRA Analytics Limited's holding company, ICRA Limited (ICRA), and should not be construed as any indication of credit rating or grading of ICRA for any instruments that have been issued or are to be issued by any entity. Past performance may or may not be sustained in the future.

Aditya Birla Sun Life AMC Limited /Aditya Birla Sun Life Mutual Fund is not guaranteeing/offering/communicating any indicative yield/returns on investments. The sector(s)/stock(s)/issuer(s) mentioned in this document do not constitute any research report/recommendation of the same and the Fund may or may not have any future position in these sector(s)/stock(s)/issuer(s). The information herein is meant only for general reading purposes and the views being expressed only constitute opinions and therefore cannot be considered as guidelines, recommendations or as a professional guide for the readers.

MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY.